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| Employee: Supervisor: Division/Branch: Date:  |

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| **STEP 1 (A) PLANNING DISCUSSION** |
| **Key Result Areas (KRA):*****Enter Title of KRA*** | **Key Performance Indicators (KPI’s)*****List individual KPI’s for each KRA*** | **Performance Standards and Success Measures:*****RATING SCALE:******5. Exceptional*** *– continuously exceeds all of the performance requirements****4. Excellent*** *– often exceeds the performance requirements****3. Satisfactory*** *– meets the performance requirements* ***2. Unsatisfactory*** *– needs support and assistance to meet the performance requirements****1. Unacceptable*** *– does not meet the performance requirements****Please circle*** |
| 1.  |  | *1* | *2* | *3* | *4* | *5* |
|  | *1* | *2* | *3* | *4* | *5* |
|  | *1* | *2* | *3* | *4* | *5* |
|  | *1* | *2* | *3* | *4* | *5* |
| 2.  |  | *1* | *2* | *3* | *4* | *5* |
|  | *1* | *2* | *3* | *4* | *5* |
|  | *1* | *2* | *3* | *4* | *5* |
| 3.  |  | *1* | *2* | *3* | *4* | *5* |
|  | *1* | *2* | *3* | *4* | *5* |
|  | *1* | *2* | *3* | *4* | *5* |

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| **STEP 1 (A) PLANNING DISCUSSION** |
| **Key Result Areas (KRA):*****Enter Title of KRA*** | **Key Performance Indicators (KPI’s)*****List individual KPI’s for each KRA*** | **Performance Standards and Success Measures:*****RATING SCALE:******5. Exceptional*** *– continuously exceeds all of the performance requirements****4. Excellent*** *– often exceeds the performance requirements****3. Satisfactory*** *– meets the performance requirements* ***2. Unsatisfactory*** *– needs support and assistance to meet the performance requirements****1. Unacceptable*** *– does not meet the performance requirements****Please circle*** |
| 4.  |  | *1* | *2* | *3* | *4* | *5* |
|  | *1* | *2* | *3* | *4* | *5* |
|  | *1* | *2* | *3* | *4* | *5* |
| 5.  |  | *1* | *2* | *3* | *4* | *5* |
|  | *1* | *2* | *3* | *4* | *5* |
|  | *1* | *2* | *3* | *4* | *5* |
| 6.  |  | *1* | *2* | *3* | *4* | *5* |
|  | *1* | *2* | *3* | *4* | *5* |
|  | *1* | *2* | *3* | *4* | *5* |

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| **STEP 1 (B) UPDATE / DEVELOPMENT PLAN FOR SKILLS & KNOWLEDGE IN CURRENT POSITION** (at commencement and progress discussions) |
| **Employee: Supervisor: Date:** |
| **Skills & Knowledge Development I need to do my current Job?** | **They can best be met by?** | **Priority (see guidelines for definition)** | **Progress/Review of Development****(Actions/Achievements)** |
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| STEP 1 (C) DEVELOPMENT PLAN *FOR FUTURE* (at commencement and progress discussions) |
| **Skills & Knowledge Development I need to do my current Job?** | **They can best be met by?** | **Priority (see guidelines for definition)** | **Progress/Review of Development****(Actions/Achievements)** |
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**PLEASE FORWARD A COPY OF THIS SHEET TO THE [e.g. CHAIRPERSON OF THE BOARD OF DIRECTORS] UPON COMPLETION AND AFTER EVERY ADJUSTMENT.**

Please note any assistance you need to meet Development & Training needs, BE SPECIFIC. e.g. Not “Computer Training” but… “Arrange attendance at Microsoft 365 Advanced course by end of November” or “Please get back to me on development options for need asterisked above”.

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Employer Signature Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Employee’s Signature Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

INDIVIDUAL PERFORMANCE AGREEMENT

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| Employee: Supervisor: Division/Branch:  |
| STEP 2 (A)PROGRESS DISCUSSION**DATE:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | **STEP 2 (B)**FINAL REVIEW**DATE:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| What success have I had? What needs to be changed/added? | **Specific comments & assessment of progress. To what degree does my performance meet the agreed standards?** |
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UPON COMPLETION PLEASE FORWARD A COPY TO THE [ENTER POSITION(S)]

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| **STEP 3 (A) ASSESSMENT DISCUSSION SUMMARY** (at 12 months) |
| Assessment Discussion Summary by Manager: Assessment Discussion Comments by Employee: |
| **STEP 3 (B) OVERALL ASSESSMENT RATING BY [e.g. BOARD OF DIRECTORS]** (at 12 months) |
| Rating Scale5. Consistently exceeds all of the Performance requirements.4. Exceeds agreed Performance requirement.3. Meets all of the Performance requirements.2. Performance needs some improvement to better meet all of the agreed Performance requirements.1. Doesn’t meet agreed Performance requirements.Employer Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Employee Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**This information will be treated as confidential.** |